

Meeting Report

Leadership Evaluation Advisory Group (LEAG)

A Two-Day Collaborative Meeting

“Emerging Evaluation Practices Sustaining Leadership Development”

APRIL 9-10, 2003

Sponsored by the Population Leadership Program (PLP) and
Sustainable Leadership Initiative (SLI)
Projects of the Public Health Institute

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HRN-A-00-99-00012-00 with the United States
Agency for International Development.
Sustainable Leadership Initiative is a collaboration
of USAID, WKKF, and PHI/PLP

Introduction

In March of 2002, the USAID-funded Population Leadership Program (PLP) of the Public Health Institute (PHI) convened the first meeting of the Leadership Evaluation Advisory Group (LEAG), a broad cadre of external experts and practitioners working in the field of global health leadership. At this initial meeting, LEAG conceptually validated the EvaluLEAD Framework, a lens for planning and evaluating leadership development interventions and programs. Subsequently, the EvaluLEAD Framework was deemed “an innovator in the field” based on a scan of 55 leadership development programs conducted by the WK Kellogg Foundation. Kellogg has joined PLP and USAID to support and collaborate on the investment to develop tools for the leadership and international development community through the new Sustainable Leadership Initiative (SLI). To further develop this work, PLP convened a second meeting of LEAG to share applied evaluation experiences, emerging practices, and reflect on the EvaluLEAD Framework once again. The meeting, expanded to nearly two days in length, was held on April 9-10, 2003 at the Marriott Metro Center in Washington D.C. Again, a diverse and committed group of colleagues from domestic and internationally focused leadership programs and donors gathered to share their experience and perspectives in a highly interactive venue. Summary notes and actual group memory from the day’s small and large group discussions are provided below.

Starting Up:

John Grove, LEAG Chair, SLI Director and PLP Learning & Evaluation Manager convened the meeting, welcoming participants and inviting opening remarks from program sponsors, PLP Director, Sharon Rudy, Director of USAID’s Office of Population & Reproductive Health, Margaret Neuse and WK Kellogg Foundation Evaluation Manager, Craig Russon.

Context for the meeting was established as John noted trends in the fields of evaluation and leadership development and recapped the direction LEAG had moved last year in conceptually validating the EvaluLEAD Framework through a collaborative process of discussion. He clarified that the work this year as “the next step for our field” focused on sharing applied evaluation experiences, emerging practices and reflecting on these in light of the EvaluLEAD Framework.

John introduced this year’s advisors who were to serve as resources in the meeting sharing their perspectives on leadership and evaluation as well as facilitate the small group discussions to generate themes and recommendations. This year’s advisory panel comprised a rich mix of experience and orientations in the field of leadership evaluation:

Advisory Panel

Bruce Avolio, Donald O. & Shirley Clifton Chair in Leadership. Director, Gallup Leadership Institute, University of Nebraska School of Business. Senior Research Scientist, The Gallup Organization. **Barry Kibel**, Senior Scientist, Pacific Institute for Research and Evaluation. Author of Success Stories as Hard Data. **Jennifer Martineau**, Senior Scientist and Evaluation Manager at the Center for Creative Leadership and co-author of Maximizing the Value of 360-Degree Feedback: A Process for Successful Individual and Organizational Development. **Margaret Neuse**, Director, Office of Population and Reproductive Health, Bureau for Global Health, United States Agency for International Development. **Craig Russon**, Evaluation Manager for leadership development at the WK Kellogg Foundation.

Board Member of the American Evaluation Association. Author/Editor of Annotated Bibliography of International Programme Evaluation (Kluwer, 2000).

Introductions were completed with participant self-introductions all around (participant list on last page of this document).

Shared Context & Framework For The Meeting

In order to begin the meeting from a common and collective viewpoint, John reviewed the meeting purpose and desired outcomes:

Purpose: To share applied evaluation approaches and emerging practices in leadership development programs, gain expert-level advice, and examine elements of the EvalLead Framework.

Desired Outcomes:

- Discussion and collective understanding of a broad range of applied evaluation approaches.
- Documentation of key indicators
- Recommendations for the fields of leadership and evaluation generated
- The EvalLEAD Framework refined and clarified
- An agenda for continued learning and development of best practices outlined

Loni Davis, an external consultant working with John on the design and co-facilitation of the meeting, reviewed the agenda for the day and emphasized that the format this year was designed to offer some thought provoking presentations on applied leadership evaluation approaches and then provide multiple opportunities for people to respond, interact with colleagues and share individual perspectives. The specific format, presentation→advisor remarks→ small group discussion → large group report out and syntheses would be repeated several times throughout the two-day meeting.

The second part of establishing shared context among participants was the first presentation, which would review findings from a broad scan of leadership evaluation practices within multiple and varied leadership development programs and then bring meeting participants back to consider implications for the EvalLEAD Framework.

Presentations & Discussions

Day One Presentation One:

WKKF Leadership Evaluation Scan and The EvalLEAD Framework
Claire Reinelt, Senior Consultant, Development Guild/DDI
John Grove, Director, Sustainable Leadership Initiative

Summary

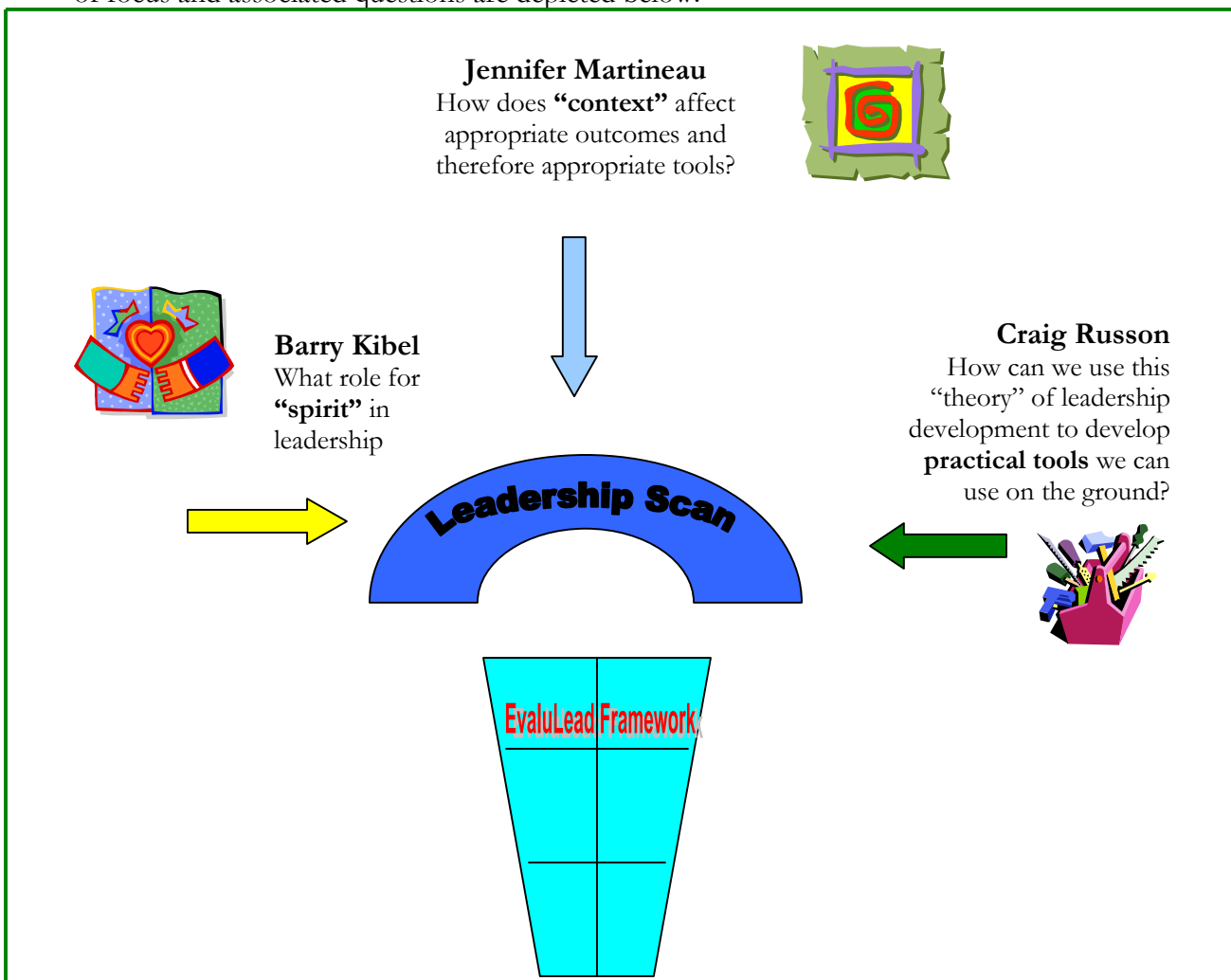
Evaluating Outcomes and Impacts: A Scan of 55 Leadership Development Programs provides an overview of how leadership programs are evaluating their outcomes and impacts. The scan identifies outcome areas where programs intend to have an impact; surfaces questions about those outcome areas that are characteristic of those that programs and evaluators are asking; explores evaluation approaches, methodologies, and sources of information that programs are using; and presents some of the evaluation challenges that are being encountered. One of the key findings of the scan is that the field of leadership

development has learned a lot about the short-term impact that leadership programs have on the knowledge and skill development of individuals, as well as changes in individual attitudes and perceptions. There is far less knowledge about the social capital that these programs generate, as well as their community and social impact.

Grounding EvaluLEAD presents implications of a secondary analysis of the scan of 55 leadership development programs. The aim of the analysis is to define concepts relative to the EvaluLEAD Framework to develop steps for application in planning and evaluation efforts. The Sustainable Leadership Initiative (SLI) team examined every in-depth program profile from the scan. The team ranked the potential of evocative and evidential approaches and tried to capture the prevalence of outcomes in the various domains based on EvaluLEAD's concepts. The presentation covers implications of the analysis. These include a basis for developing and assessing outcomes at levels beyond solely that of the individual, clarification of questions programs would explore to develop outcomes and identify evaluation approaches, and makes a case for the need for useful and expanded evocative inquiry.

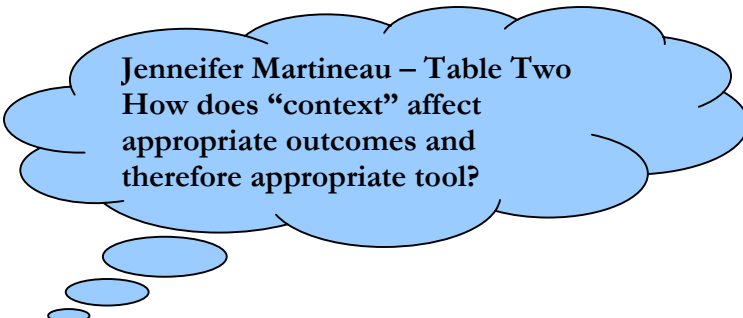
Advisor Feedback:

The advisors were each asked to share their remarks about the Leadership Scan as well as address implications they perceived for the EvaluLEAD Framework. Within this context, **each advisor identified a primary challenge or question** that they would like to explore further in the small discussion groups with meeting participants. The advisor's selected area of focus and associated questions are depicted below.



Group Memory From Discussion Report Outs

Advisors from each of the three small group discussions were asked to report out to the large group discussion highlights, implications for the EvaluLEAD Framework and any other question or challenges that were identified during their discussion.



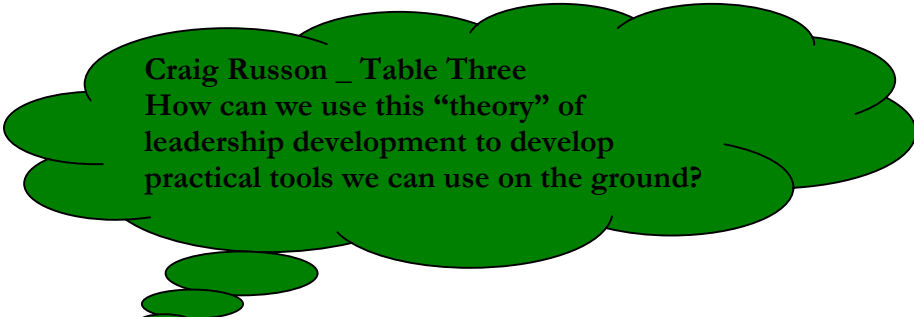
Jenneifer Martineau – Table Two
How does “context” affect appropriate outcomes and therefore appropriate tool?

Highlights:

- ☐ What it means to be a leader will vary, therefore definition of “leadership” varies
- ☐ Outcomes of program design should show context.
- ☐ EvaluLEAD needs to have flexibility, critical questions, and supporting “stuff” to get at context; help people understand role of leadership and context so that they influence each other.
- ☐ Stories are a very powerful way to show leadership but will also need evidential data to give a complete picture. Stories need to be tied to outcomes, etc.
- ☐ Policy is a critical piece of context because it creates an enabling or disabling environment.

Challenges / Other Questions To Explore:

- ☐ How to separate outcomes from context while recognizing their relationship?
- ☐ Need to understand how particular tools are influenced by contextual differences.
- ☐ Need to discover a way to write-up work and learning so that others can learn from it.



Craig Russon _ Table Three
How can we use this “theory” of leadership development to develop practical tools we can use on the ground?

Highlights:

- ☐ The EvaluLEAD Framework allows us to identify gaps. We know how to do evaluation for the individual, but we need to know more about the community/societal level.
- ☐ Sense that there are tools out there from other fields to help us (i.e. plug the gaps we’ve identified.)

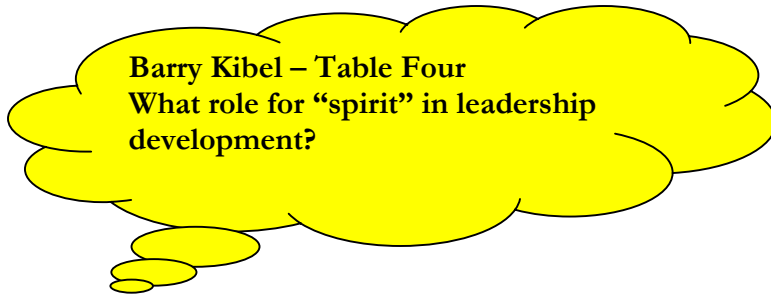
Implications:

- ☐ The various levels/dimensions of the EvaluLEAD Framework are not exclusive.

- This process may cause us going back to change it, therefore the framework must be flexible.

Challenges / Other Questions To Explore:

- Where in the model is measurement of performance of results



Highlights:

Leadership Preparation

- Greatest gift of leadership programs is healing (including listening as a healing skill) and also space
- Can you train people to heal? Is this a trainable skill? The “x factor” (love? spirit?) is crucial here. You can take someone to the edge but they need to have the “x factor” to complete the process.

Recreate State Of Love

- Leadership can be about power/manipulation in addition to love
- PLP teaches a strategy for flourishing in times of crisis.

Marketing

- Will the powers who pay the bills accept this?
- Challenge of not using authentic language – how do you do a thing without using words?
- We have the power of science here; need to bring in the emerging science base.
- It is easier to speak of “spirit” outside of US (The idea is more accepted overseas.)
- Evaluation needs to capture the “whole story” which is never a simple measure; you need to go beyond objective measures
- When is **Evocative**/evidential important and when is evocative/**Evidential** important in order to affect change in an organization?
- You need evocative measures to go past “what” and “why” to get to who.

Some “Big” Themes Coming Out of Day One Discussions:

- We seem to lack tools / methods to capture the evocative. We need to develop more.
- Some tools to capture the evocative we discussed are:
 - Journaling
 - Questions that probe
 - Story telling
 - Narrative
- Capturing evocative data takes as much (if not more) rigor than capturing evidential data.

Day Two Presentation One:

Emerging Practices: Public Health Institute's Population Leadership Program Sharon Rudy, Director and John Grove, Learning & Evaluation Manager

Summary

The Population Leadership Program partners with USAID to enhance technical capacity through fellowships, support and improve leadership and management of programs, and improve work processes through organizational development services. PLP's specific objectives are to:

- Increase technical capacity within PHN sector
- Improve leadership & management of selected Global Health programs
- Improve work processes in the Bureau for Global Health

Emerging Evaluation Practices

Leadership, or leading, is a theme throughout PLP's interventions as guided by the Integrated Leadership Framework (ILF). The ILF outlines commitments, practices and outcomes that are critical to leadership in the USAID context. PLP's interventions are flexibly framed using the ILF. PLP employs the EvaluLEAD Framework to organize evaluation approaches appropriate to the outcomes stated in the ILF as well as the program's Results Framework. PLP's focuses efforts for desired outcomes in the table below at the individual and organizational levels.

Organizational/Evidential

Coordinated action
Effective partnerships

Individual/Evidential

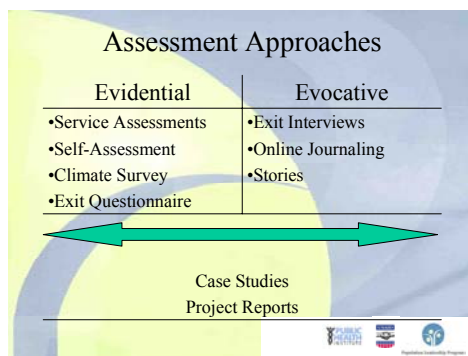
Improved performance

Organizational/Evocative

Sense of shared vision
Effective partnerships

Individual/Evocative

Enhanced personal influence
Increased self-awareness



Emerging Indicators	
Organization/Evidential	Organization/Evocative
<ul style="list-style-type: none">•Existence of vision statement•Existence of documented meetings where vision discussed•Action coordination by valuing people's differing skills	<ul style="list-style-type: none">•Ability to foster a civil and caring working environment•Value a broad range of elements of diversity
Individual/Evidential	Individual/Evocative
<ul style="list-style-type: none">•Ability to express vision to a group•Willingness to compromise to achieve vision•Actively communicates values with others to achieve productive relationships	<ul style="list-style-type: none">•Openness to discussing actual cultures vs. others one is exposed to•Ability to incorporate a wide view of a system•Ability to understand universal commonalities of groups operating values

Advisor Feedback:

The advisors were each asked to share their remarks about PLP's presentation as well as address implications they perceived for the EvaluLEAD Framework. Within the context of the presenter's requested areas for feedback, **each advisor identified a primary challenge or question** that they would like to explore further in the small discussion groups with meeting participants. The presenter's selected area of focus and advisors' associated questions are depicted below.

Bruce Avolio

Explore why we leave "T" out and separate Theory, Development and Evaluation?

T + D + E



How do we balance **subjective** and **objective** elements in the evaluation process?



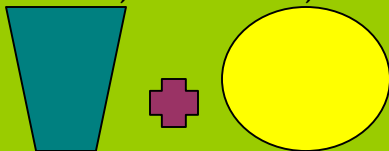
Jennifer Martineau

Explore balance of stakeholders.



Craig Russon

Explore how the EvaluLEAD Framework is integrated into the Integrated Leadership Framework with a focus on the objective and subjective.



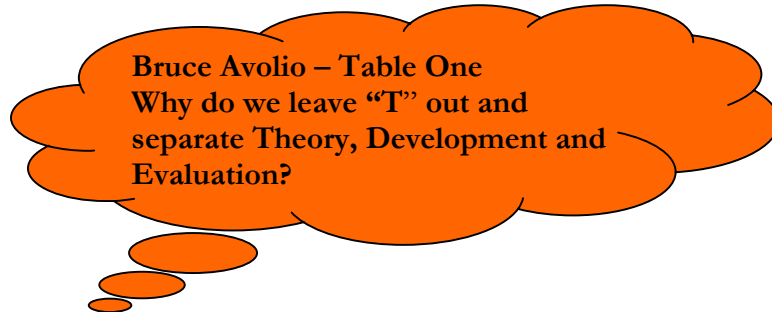
Barry Kibel

Explore complementarity between evocative and evidential.



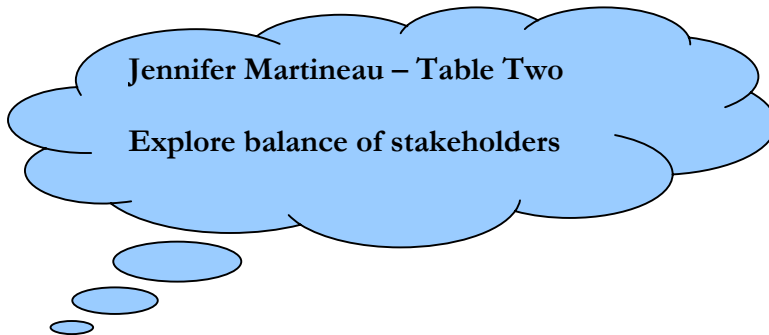
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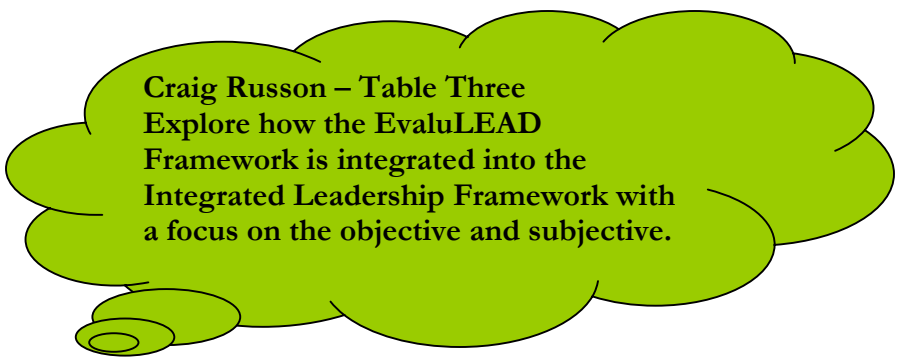
Highlights:

- ❑ Awareness of implicit guiding theory. Why don't we tell/articulate this theory?
- ❑ What is “theory of change”?
- ❑ Selection? What is it based on? There are 3 conditions- funding, organization & individual
- ❑ There is an assumption on cultural applicability (re theory of change and evaluation) made but nuances need to be looked at. (Now there is literature coming from other countries ...)



Highlights:

- ❑ First one must identify stakeholders. (They may be various.)
- ❑ Understand stakeholders first and clarify their needs to help shape evaluation
- ❑ Understand underlying values systems
- ❑ Appreciate dynamic relationships between stakeholders



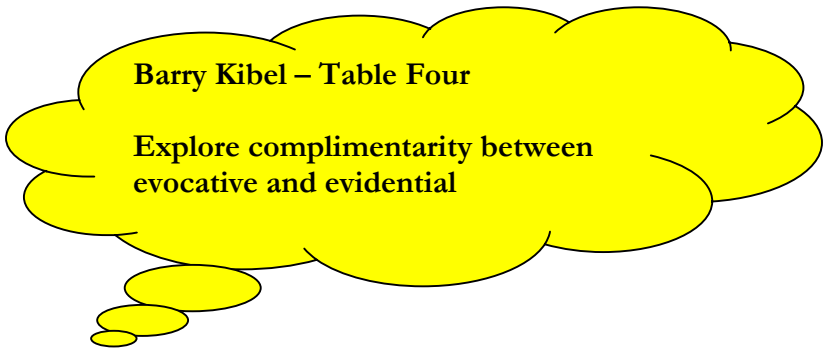
Craig Russon – Table Three
Explore how the EvaluLEAD Framework is integrated into the Integrated Leadership Framework with a focus on the objective and subjective.

Highlights:

- ❑ The EvaluLEAD Framework and Integrated Leadership Framework were developed separately.
- ❑ The Integrated Leadership Framework could be placed into each cell of the EvaluLEAD Framework (problem is that it (ILF) doesn't differentiate between individual and organizational)

Questions:

- ❑ The Integrated Leadership Framework stops at the organizational level- what about societal and community level?
- ❑ Is the Integrated Leadership Framework the same when addressing individual and organization levels?



Barry Kibel – Table Four

Explore complementarity between evocative and evidential

Highlights:

- ❑ There is a tension between generalization and making meaning
- ❑ Evocative = synchronistic link, evidential = causal link. Both linkages there is complementary
- ❑ There are vertical as well as horizontal linkages on EvaluLEAD.

Day Two - Presentation Two:

Emerging Practices: Management Sciences for Health, Management and Leadership Program

Joan Galer, Director, Leadership Development

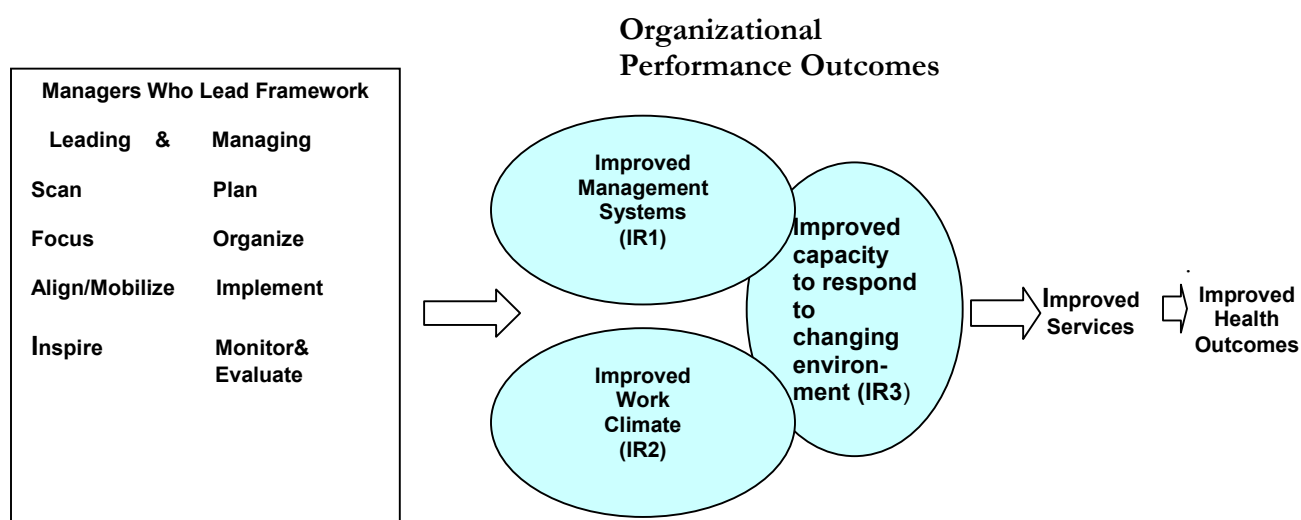
Summary

M&L aims to enable organizations and programs to achieve sustainable results under complex conditions.

LEADING aligns the internal organization with external conditions, and personal interests with organizational mission, and **MANAGING** aligns the internal parts of the organization

Emerging Evaluation Practices

The following diagram describes M&L's measurement mandate. Applying the M&L “Managers Who Lead” framework, expected outcomes to be measured are represented by the shaded ovals.



Over the past year, we have continued to develop and consolidate our measurement strategy that includes the following activities:

- 1 Client-based M&E plans provide a basis for measuring the extent to which organizational performance objectives in management and leadership are being met.
- 2 Specific leadership development interventions are evaluated for immediate and for medium-term effects, using internal as well as quasi-OR approaches to evaluation.
- 3 Leadership indicators are developed and tested on an ongoing basis

Linkages to Evaluable Framework

Even with the same M&L framework as a point of departure, our key interventions in leadership development emphasize different outcome domains according to the Evaluable Framework. We will describe two of these interventions:

- 1 Egypt: uses a primarily evidential approach, emphasizing organizational outputs and, to some degree, organizational values.
- 2 Guinea: uses an evocative approach, emphasizing outcomes in personal growth and organizational values. Measurement will also take place in the “organizational outputs” domain.

Advisor Feedback:

The advisors were each asked to share their remarks about MSH's presentation as well as address implications they perceived for the EvaluLEAD Framework. Within the context of the presenter's requested areas for feedback, **each advisor identified a primary challenge or question** that they would like to explore further in the small discussion groups with meeting participants. The presenter's selected area of focus and advisors' associated questions are depicted below.

How can we put our measurement finger on that intersect between the personal and organizational that makes for improved sustainability of leadership?



Bruce Avolio
Explore simulation
of principles of
leadership.

Jennifer Martineau
How can we use
action learning as a
way to enhance and
sustain leadership
development?

Barry Kibel
How to make dream-making
operational?

Group Memory From Discussion Report Outs

Jennifer Martineau

How to use action learning as a way to enhance and sustain leadership.

Highlights:

- ❑ Action learning = a work team with a learning facilitator. The learning facilitator works with a group to understand processes.
- ❑ This is a capacity building and sustainable action.
- ❑ The ability to identify the next challenge is important
- ❑ Action Framework can act as a linkage for “T/D/E”, it allows interplay between individual and organization levels.
- ❑ There are a number of competing theories and the success of the EvaluLEAD Framework is in its ability to incorporate other ideas
- ❑ How to include the time dimension as part of the framework?
- ❑ Evolution is based on feedback and feedback is an important part of learning.

Bruce Avolio

Explore simulation of principle of leadership. Does what happens in a meeting become a tangible output and how can we predict that?

Highlights:

- ❑ People in an organization will fight new ideas therefore this must be reflected in the simulation
- ❑ Exploring organizational context (should be enabling)
- ❑ Sponsorship- who is sponsor and what is the context? Sponsor has a role to help change process.
- ❑ There is a problem with accelerating turnover at an organization. (The sponsor needs to address this.)
- ❑ It is important to support people after they leave the workshop

Questions:

- ❑ The intervention needs to be simple, useful and not costly
- ❑ How do we avoid project program creep? (We need to substitute instead of creep.)
- ❑ Should we experiment with clients?

Barry Kibel

How to make dream-making operational so that:

- the ability to align and mobilize is enhanced
- the capacity to innovate is strengthened
- impacts of results become more probable

Highlights:

Individual versus shared dream making

- ☐ Dream-making opens perspective
- ☐ Question: How to keep this open?
- ☐ Ultimately it is shared dream-making for group/company but many groups do not allow shared dream-making
- ☐ Are all capable of dream making?
- ☐ Yes, inherent in all
- ☐ Training can bring out (storytelling)

Difference between values, visions and dreams

- ☐ Have different powers but all unlock processes
- ☐ Dreams ask to be change
- ☐ Values are so broad anything can fit into them
- ☐ Dreams=present; vision & values=future, to have an integrated approach must live with all 3
- ☐ How to get donors involved in process
- ☐ How allow dream-making process to occur so that it is no “dumbed down”
- ☐ Dream-making offers very rich feedback process (because open system requires open systems feedback process but most now are closed system feedback processes)

Day Two Presentation Three:

Emerging Practices: Institute of International Education
Leadership Development Mechanism
Martina Frank, Deputy Director, Population Programs

Summary:

The overall goal of the Leadership Development Mechanism (LDM) program is to strengthen 300 emerging and established leaders from Ethiopia, India, Mexico, Myanmar, Nigeria, Pakistan, Philippines and Sudan in order to expand reproductive health choices and services in these eight countries. The program targets women,

youth and media professionals working in the field of population and reproductive health. The LDM supports short-term and long-term training programs globally in four major areas: **1. Reproductive health and population** **2. Leadership skills development** **3. Technical Training** **4. Gender & population**

The LDM program seeks to achieve the following short-term objectives:

- To strengthen specific **leadership skills** of participants.
- To enhance participants' **knowledge** of population, family planning and reproductive health
- To consolidate **commitment** to population and reproductive health.
- To expand individuals' **vision** as leaders.

LDM's long-term objectives include:

- To support and sustain in focus countries a critical mass of population and RH leaders with special emphasis on women, youth and media professionals.
- To improve and facilitate the efforts of population and family planning leaders in LDM focus countries, applying state-of-the-art leadership development approaches.
- To strengthen and solidify collaboration among leaders by building networks and partnerships among US, regional and focus country institutions participating in leadership development.

Emerging Evaluation Practices

In 2002 IIE, in collaboration with an evaluation consultant, conducted its first evaluation designed to measure progress toward the program's short-term objectives. Recognizing the complexity of the program, for this evaluation we focused on Fellows as our primary data-gathering source and implemented both a process (implementation analysis) and outcomes evaluation. For the LEAG meeting, I will focus on the LDM outcomes evaluation only.

Expected evaluation **outcomes** include:

- Training programs met fellows' self-identified training needs;
- Increased reproductive health knowledge;
- Strengthened leadership skills;
- Expanded Fellows' vision; and
- Increased commitment to RH/FP

Key **Indicators** include:

% of fellows who report increased capacity in selected **leadership skills** set including communications skills, strategic planning skills, advocacy skills, problem-solving decision-making skills.

% of fellows who report increased **knowledge in population** content areas, including HIV/AIDS prevention, maternal health, including safe motherhood and emergency obstetrics, and family planning.

% of fellows who report increased knowledge and understanding of **gender** and population, including gender-sensitive program design, gender sensitivity, and gender-based violence.

of fellows who report an ability to inspire others to work in reproductive health (**commitment**)

% of fellows who report an increased interest in mentoring others (**commitment**)

of fellows who report a change in how they see themselves as leaders, their organizational vision, and vision of **the** reproductive health situation in the community (**vision**).

We used a variety of qualitative and quantitative data collection instruments, including pre-and post-test assessments (quantitative), exit interview (qualitative) and the LDM Final Report (qualitative and quantitative). The pre-and post-test assessment was designed to measure primarily changes in skills and knowledge, while the exit interview focused on assessing commitment and vision. The LDM final report was designed to evaluate the training experience and asked Fellows to develop a personal leadership development plan over a one-year period.

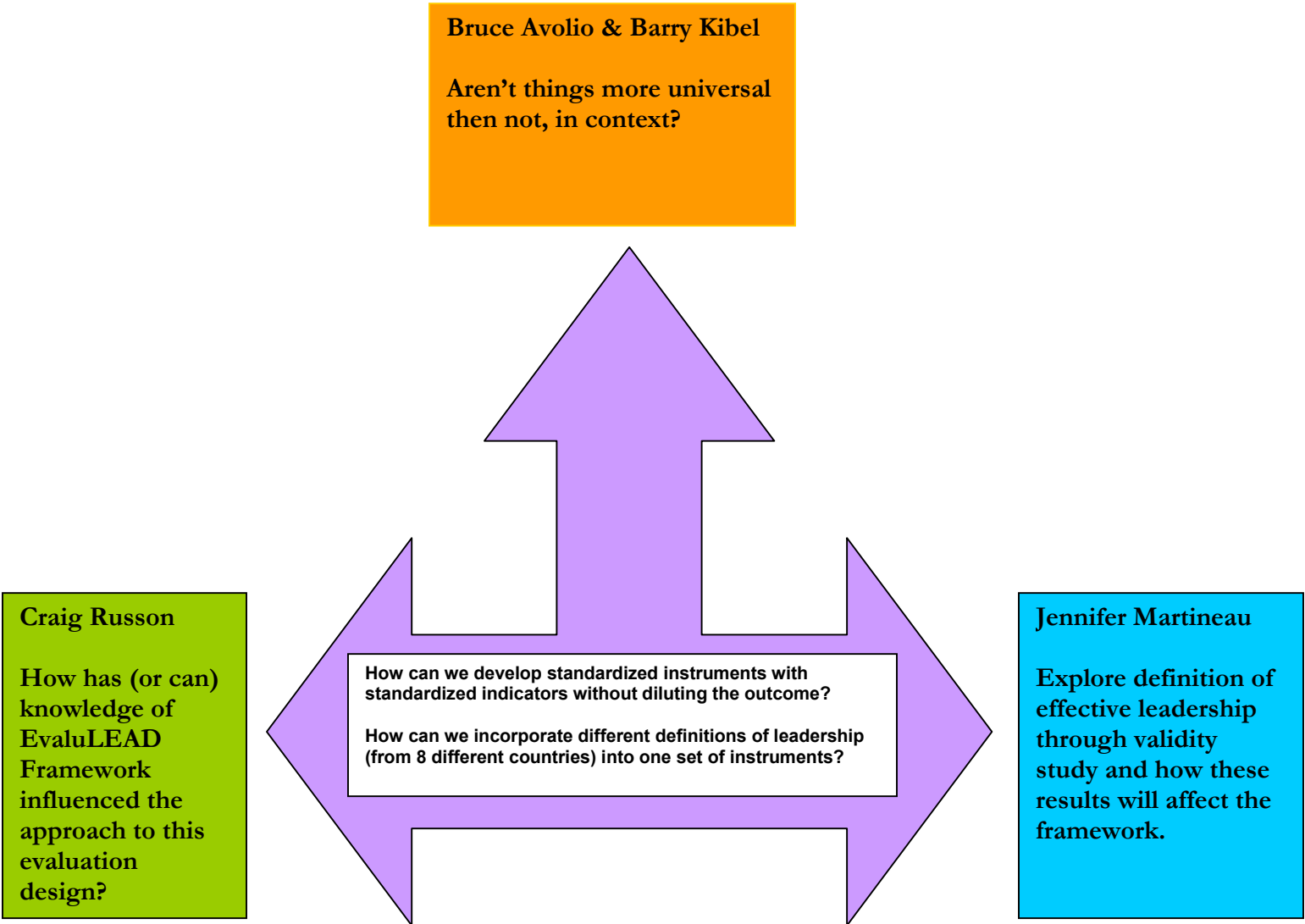
Linkages to EvaluLEAD Framework

As the LDM is a new program, this initial evaluation focused on assessing short-term objectives on the individual level. We used both evocative and evidential approaches, as reflected in the design of the quantitative pre- and post-test assessment and the qualitative design of the post-training interview as well as the Leadership Development Plan (part of the Final Report). Findings from the evaluation suggests that evocative approaches are effective in illuminating changes in vision and commitment, and that evidential approaches are useful to assessing changes in skills and knowledge.

Advisor Feedback:

The advisors were each asked to share their remarks about IIE's presentation as well as address implications they perceived for the EvaluLEAD Framework. Within the context of the presenter's

requested areas for feedback, **each advisor identified a primary challenge or question** that they would like to explore further in the small discussion groups with meeting participants. The presenter's selected area of focus and advisors' associated questions are depicted below.





Bruce Avolio & Barry Kibel

Aren't there more things that are universal then not, in context?

Highlights:

- Programs/activities are n=1,300 times, not n=300.
- A standardized way will lead to frustration.
- There are common themes that all leaders have.
- An instruments can/should be customized based on how it is filled out. Standardization will be the differences in pre- & post-test scores.
- Constructs (i.e. respect) by tactics for achieving it are different; you can measure change using open questions; or the change within each person.
- What can you aggregate? Sometimes you can do a lot, sometimes not a lot.
- Essence of leadership across cultures: tested against “caste system” but just narrows development
- Functions of leaders may be culturally specific to “get the job done”, but “leadership” is arguably universal

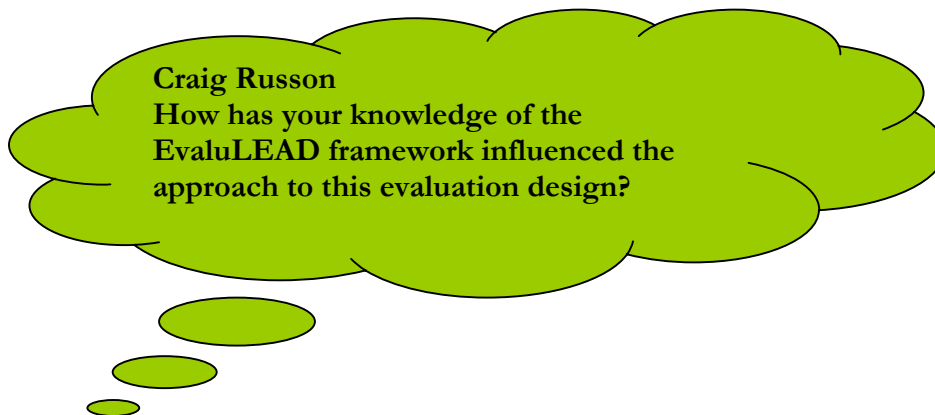


Jennifer Martineau

Explore definition of effective leadership through validity study and how these results will affect the framework.

Highlights:

- Need to be transparent with participants: this will help develop country-specific indicators.
- Use evaluation measures pre-, during, and post- activity to determine shift in indicators/definitions.
- Use fellows to help define country-specific effective leadership activities.
- The more that a program is n=1 (the more that it focuses on the individual) and the more evocative the evaluation approach needs to be.
- If there are strong contextual issues, how much do we use our cultural lens to evaluate projects?



Highlights:

- ☐ Not influenced at all
- ☐ Consciously fit in
- ☐ Ability to use standard instrument if intervention is not standardized? (Does it make any sense to do so-in any situation?)
- ☐ People from sample target intervention countries should be involved in the creation/ revision of the EvaluLEAD Framework
- ☐ “Universal principles” don’t appear to be truly neutral across cultures.

Day Two Presentation Four:

**Retrospective Evaluation: Center for Health Leadership and Practice
(CDC- funded)
Carol Woltring, Executive Director**

Summary:

The mission of the CDC/UC PHLI was to strengthen the public health system by enhancing the leadership capacities of senior public health officials to address the challenges facing public health.

Its goals were to develop scholars’ abilities to create and implement, with their organizations and communities, the following: (1) shared vision for the public’s health, (2) develop the skills to mobilize resources and the organizational and community capacity necessary to address public health challenges and achieve the national health objectives, and (3) develop a national network that fosters life-long learning and shapes the future of public health.

Its educational objectives were to: (1) provide scholars with knowledge, skills and experience that would enhance their ability to provide public health leadership, (2) support scholars in exercising leadership within their organizations, professional organizations, and other contexts, and (3) enhance scholars’ skills and abilities to develop collaborations that contribute to the develop of health communities.

Emerging Evaluation Practices

For the eight-year retrospective evaluation, we used a mixed method approach of a written survey (with closed- and open-ended questions) and interviews with observers from the field, the funder

(CDC), and management/faculty. The program hoped to see enhanced leadership skill in the individual scholars (participants) and improved leadership for their organizations, communities and the field of public health. Our evaluation results demonstrate that these impacts occurred.

Key Indicators

Indicators were based on the core curriculum domains of Personal Leadership, Organizational Leadership, Community Leadership, Communication Skills, and Leadership in Training Others. (Scaled items were developed for each of these domains.) In addition, the survey looked at impact of PHLI on participants' professional networks and their activities in the wider field of public health. We also collected data on successful leadership accomplishments linked to the PHLI experience and the PHLI-linked skills used to deal with challenges or problems encountered working toward the accomplishment.

Data Collection

We used the Dillman Total Design Method for achieving a high response rate (67%) on the written survey. Data from the survey was coded using SPSS and the open-ended and interview data were coded by themes. The evaluation consultant handled the data management to ensure confidentiality.

Linkages to EvaluLEAD Framework

The EvaluLEAD Framework basically “fits” our retrospective evaluation. Our theory of action shares elements with the Framework. We assessed primarily at the individual level followed by the individual impacting his/her organization, the community and the field of public health. We used a combination of evidential and evocative data collection. We focused on all three levels (not “society”, however) combining both approaches – evocative and evidential.

Feedback:

For this final presentation, a lively open discussion was held with all meeting participants and facilitated by Carol. The presenter's selected area of focus and highlights of the discussion are captured below.

Are retrospective evaluations worthwhile?

- ☐ Yes, there is a difference ‘valuing’ of the development x amount of time after the program. Important to capture.
- ☐ Difficult because you're assuming two levels of causality (training helped me and caused me to do ‘x’)
- ☐ Also problems of recall
- ☐ Yes, want to evaluate retrospectively by not to affirm the training rather to identify improvements and changes to program
- ☐ Issue of time
 - All evaluations are retrospective to some degree- so there are always problems of recall. Need to identify which things are most sensitive to time.
 - Idea of having individuals write or respond to a scenario that you would expect individual to be dealing with. (Could do pre- and post- evaluations)
- ☐ To keep cost effective, keep simple
 - Example: polling frequently about one dimension, TRUST
 - Use web-based evaluations
- ☐ Issue of ‘time’ in the EvaluLEAD Framework; Options:
 - It is part of the EvaluLEAD Framework- context piece
 - Needs to be included as a separate entity
- ☐ What do we mean by time/timing?
 - Length of program
 - Time within which we expect to see results? outcomes achieved
 - Stakeholder expectations
 - Base time issue on where/when the learning can be harvested (not on funders)

- Identify outcomes that can be evaluated and achieved on short, medium and long-term basis

Key Themes and Common Ground

Participants looked back over the presentations and discussions of the past two days and considered key themes and recommendations that stood out. These were captured as follows:

- We need to move to processes that examine “results-based space” as opposed to measuring the individual so intensively.
- EvaluLEAD Framework is a tent for everyone to use as a guide for discussion and the framework itself is being developed as a specific tool
- We need to move beyond just “Beyond ringing the bell.” What change did we really make or contribute to as opposed to simply checking off activities.
- We need to incorporate and link Learning action theory with the processes of T/D/E (theory/development/evaluation). Evaluation should not be “separate” but rather a natural feedback loop based on ongoing learning.
- We need to develop the following tools as a community and for the EvaluLEAD guide:
 - Scenarios/simulation
 - Context assessment (checklists)
 - Standard for evocative inquiry and analysis
 - Indicator selection/ranking tools
 - Identify appropriate measurement approaches: 360 degree, FGD, and related key question guides on type and scope
 - Case Studies designs and example applications
- We need to establish appropriate levels for intervention and associated results space.
- We need to develop methods of scooping for outcomes at the Societal/System level.
- We need to recognize and relate the realities of time to activities and the kinds of outcomes we can expect and where.

LEAG Next Steps

- Include programs that are designed to have an impact on community
- Share tools (that people are using)
- Next LEAG
 - Partnerships with other organizations that are interested in field testing EvaluLEAD Framework (and share findings from these efforts)
 - Share tools
- How to promote this work to draw in and attract more interested folks from the intersection of these fields coming together: leadership development, science of evaluation, reproductive health/public health
- How to be even more planful about changing the paradigm (strategy for doing this)
- Contact Gates/Hopkins for information on the Bangkok meeting
- National Leadership Learning Community Meeting in SF: May 15-17

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